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# TrueFiling™

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## Quick Reference Guide

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ImageSoft, Inc.

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## About TrueFiling Quick Reference

The purpose of this document is to provide a short description of the most commonly used features of the TrueFiling system. Since TrueFiling is an intuitive, web-based system, the intent is that this short manual will provide many users with enough information to use the system productively, and save the time associated with reading one of the more detailed documents.

### What is TrueFiling?

TrueFiling is a Web-based e-filing and e-service solution for attorneys and self-represented (pro per) filers. TrueFiling is found on the Web at [www.truefiling.com](http://www.truefiling.com) and allows the filing of documents to a court remotely, through the Web, instead of in person. It expedites justice by reducing paper handling and travel time and improves the court's internal processes through electronic workflow. The solution can be configured to support any case types. However, the case types for a particular court are based on the court's policy (for more information regarding supported case types see section Obtaining Additional Information).

### Related Documents

The following related TrueFiling documents exist. To view these documents you must first login to the TrueFiling site.

- TrueFiling User Guide
- TrueFiling Admin Guide

## Quick Reference

### Username and Logging in

To use the TrueFiling system, you need first to create a Username and password. Go to the [www.truefiling.com](http://www.truefiling.com) login page, and click the “New User” link and follow the instructions.

### Which Courts does TrueFiling Support?

Only specific courts are supported by the TrueFiling system. To determine if a court is supported see “Obtaining Additional Information” at the end of this document. New courts are being added all the time so check back often.

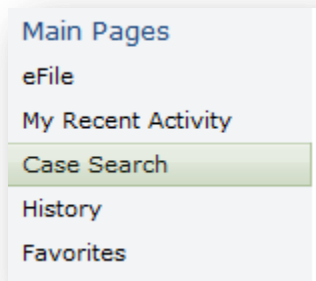
Go to [TrueFiling Court List Page](#) to view the current list of support courts.

### Preparing a Filing to an Existing Case

Once logged in, the fundamental purpose of the system is to file documents that are on your local computer to a court case.

To create a filing to an existing court case:

1. Click the **Case Search** link from the list located along the left side.



2. The **Court Case Search** page will appear.

- Choose a court from the **Court** drop down list and enter part of the case number or party name in the **Case Search** text box.

**NOTE:** The Case Search will search against both the case number and the court-assigned case description. The Case Search is quite flexible, and will let you enter a partial case number, a partial party name or full values. For example, entering **CH** will find all cases with these characters in either the case number or case description.

- Click the **Search** button. The top 200 cases that match from most recent to oldest will be displayed. The following shows a sample search result for the search criteria **CH**.

Search Results

Case Number	Court	Description	Date
2011-028516-CH	MI ImageSoft 99th Circuit Court	SPOHN, CHARLENE V AUTO CLUB INSURANCE CORP	4/1/2011
2011-028515-NF	MI ImageSoft 99th Circuit Court	SPOHN, CHARLENE V AUTO CLUB INSURANCE CORP	3/31/2011
2011-028510-CK	MI ImageSoft 99th Circuit Court	CHASE BANK USA NA V WOODCOX, RACHELLE	3/29/2011
2011-028502-CK	MI ImageSoft 99th Circuit Court	DAY, JESSICA V BENCHMARK LAND DEVELOPMENT LLC	3/22/2011
2011-028501-CK	MI ImageSoft 99th Circuit Court	SILER, CHRISTINE A V BANK OF AMERICA INC, ET AL	3/21/2011
2011-008255-DM	MI ImageSoft 99th Circuit Court	CASTILLO, MICHELLE LEE V ROMERO, AURELIO CASTILLO	3/16/2011
2011-008252-DM	MI ImageSoft 99th Circuit Court	OPAS, LISA MARIE V OPAS, CHRISTOPHER JOSEPH	3/15/2011
2011-008235-DM	MI ImageSoft 99th Circuit Court	FLYNN, AARON MICHAEL V FLYNN, JENNY LYNN	3/11/2011
2011-028481-CK	MI ImageSoft 99th Circuit Court	JPMORGAN CHASE NA V C & F CYSTEMS LLC, ET AL	3/10/2011
2011-008227-DM	MI ImageSoft 99th Circuit Court	SCHULZ, SCOTT O V SCHULZ, LIBBY JANE	3/9/2011
2011-008230-DM	MI ImageSoft 99th Circuit Court	STALLMAN, REYA RUTH V STALLMAN, MICHAEL DEAN	3/9/2011
2011-028480-AR	MI ImageSoft 99th Circuit Court	PEOPLE OF THE STATE OF MI V BEAUCHAMP, KRISTY ANN	3/9/2011
2011-008224-DM	MI ImageSoft 99th Circuit Court	SCHICHEL, MELISSA ANNE V SCHICHEL, MICHAEL DONN	3/7/2011
2011-028478-CK	MI ImageSoft 99th Circuit Court	MICHIGAN MOTEL BROKERS INC V SHAH, SHAIELSH	3/7/2011
2011-028474-NO	MI ImageSoft 99th Circuit Court	BAGLEY, EUGENE V CHERRY GROWERS INC	3/4/2011
2011-028468-NI	MI ImageSoft 99th Circuit Court	GARDINER, LINDA SCHMITZ, ET AL V TRAINES, ELIZABETH THERESA, ET AL	3/2/2011

- Click the case number link associated with the case you were searching. If the case does not appear in the search result, try refining your search criteria. For example if you were looking for a case with the party name Charles, enter **Charles** in the **Case Search** text box and click **Search**.

**Court Case Search**

Court:

Case Search (Case Number, Case Description):

Case opened on or after:  Case opened on or before:

**Search Results**

Case Number	Court	Description	Date
2011-028408-NI	MI ImageSoft 99th Circuit Court	CARSTEN, WILLIAM CHARLES V HENNING, JASON WILLIAM, ET AL	1/26/2011
2011-008065-PH	MI ImageSoft 99th Circuit Court	TYLER, CHARLES vs. RITTENHOUSE, TERRY ALLEN	1/3/2011
2011-028372-CZ	MI ImageSoft 99th Circuit Court	D&B EQUIPMENT LEASING LLC V PITTINGER, CHARLES	1/3/2011
2010-028148-NO	MI ImageSoft 99th Circuit Court	GORDON, JULIE (NEXT FRIEND), ET AL V VARNER, CHARLES, ET AL	8/18/2010

- Click on the **Case Number** associated with the case you were searching to open the Case Detail page. You will now see some details about the case.

**Case: 2011-028408-NI**

**Case Number** 2011-028408-NI

**Case Description** CARSTEN, WILLIAM CHARLES V HENNING, JASON WILLIAM, ET AL

**Court** MI ImageSoft 99th Circuit Court

Add to Favorites

View Register of Actions

**Case Filings**

There are no items to show in this view.

Add New Filing

**Contacts**

There are no items to show in this view.

Add Existing Contact
 Add New Contact
 Add Attorney
 Add New Attorney

**NOTE:** Before creating a filing you must associate an attorney with the case. The associated attorney can be yourself or another attorney that is a member of your firm.

- Click on the **Add New Attorney** link to create a new attorney for your firm and also associate them to the case. If the attorney you want to associate with the case is already a member of you TrueFiling Law Firm, you can select them using the **Add Attorney** link.


**NOTE:** To determine if an attorney is already a member of your firm, click Contacts & Attorneys from the lift side menu under Settings.

- Once an attorney is associated with the case, click the **Add New Filing** link to create a new filing against the case. The New filing for Case wizard will appear.

New filing for Case 2011-028408-NI, MI ImageSoft 99th Circuit Court

Create or Select Existing Bundle Steps: 1 2 3 4 5

Filing Name



### Bundles

Multiple filings can be submitted to the court in one transaction through a feature TrueFiling calls "bundling". A bundle can contain multiple filings and each filing can have multiple attachments.

The filing fees will be calculated based on the filings contained in the bundle. Additional fees may vary depending on the types of filings in the bundle and the destination court rules.

For this new filing, you can either add to an existing bundle or create a new one.

There are no existing bundles for the new filing. A new bundle will be automatically created for you. Feel free to change the default name to something relevant to you or the filing. Note, the bundle name will not be sent to the court with the filing.

Add this filing to the following Bundle

## New Filing for Case Wizard

The New Filing for Case Wizard steps the user through the 5-step process of creating a filing. At each step the user is provided with guidance on what actions to take. The step you are currently at is highlighted in dark blue at the top of the page:



The user traverses forward and backward through the wizard using the buttons at the bottom:



TrueFiling allows you the freedom to build a filing, and make multiple changes or cancel the filing prior to submittal. You can even log on and off the system and the un-submitted filing will be preserved between sessions.

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**NOTE:** Creating a filing within the wizard will not submit the filing to the court. Nothing will be actually filed to the court until after the user traverses all the way through the 5-step process presses Finish and then submits the filing on a separate page.

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The 5-Steps of the wizard are described below.

1. **Create or Select Existing Bundle** – This page allows the user to enter the new bundle name, or select an existing “In Progress” bundle. The wizard gives the user the option of creating personalized names for the Bundle and the Filings within the bundle, or the user can simply let the system default the name using current date-time.
2. **Click one of the filing types listed below** – This page show the user all the possible filing types based on the type of case selected, along with the corresponding court fees associated with the filing. The user selects one of the filing types to continue. When the user selects the filing type the system will display court-specific information about the filing. This information is provided by the court as-is, and should not be interpreted as legal advice.
3. **Click the attorney responsible for this filing** – You must select the attorney responsible for the filing by selecting the name of the attorney from the list of available attorneys.
4. **Upload documents associated with this filing** – This page allows you to select the files from your computer to upload.

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**NOTE:** You may want to review the section What Can I File to become familiar with the terminology.

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Start by selecting the Primary File by entering the full path name of the file in the Primary File field, or press the **Browse** button to select a file from your computer. Once a file is selected you must press the **Upload** button to load the file to the TrueFiling site. Once the Primary File is uploaded it will appear on the page, and you will be able to upload any attachments.

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**NOTE:** The system supports any number of attachments. However, each court can specify a maximum files size for each filing. The maximum file size is based on how much disk space it consumes and not number of pages.

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5. **Choose the servicing type and recipients** – For certain types of filings the court may require the filer to serve (deliver the document) to other case parties. TrueFiling provides an electronic mechanism for performing service called eService. Some courts require eService as a mandatory step and some courts allow the user to perform manual service. This page allows the user to select to eServe the filed documents to parties associated with the case.


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**NOTE:** Clicking **Finish** at this step will not file the document or perform service. The user must additionally submit the bundle associated with the filing on another page to actually submit to the court for processing.

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Once the **Finish** button is clicked and the wizard is complete, the filing will be in an “In Progress” status (for more information on filing statuses, see Checking the Status of Filings). Finishing the wizard will take you to the Bundle Detail page for the newly created filing. The following is an example of a Bundle Detail page for a newly created Answer filing.

**Information:** ! This bundle has not been submitted to the court yet. Please choose a credit card and click *Submit* to complete the submission process.




**Bundle-20121024-634866908731508992**

**Case Number** 2011-028408-NI

**Case Description** CARSTEN, WILLIAM CHARLES V HENNING, JASON WILLIAM, ET AL


**Court** MI ImageSoft 99th Circuit Court

 Add New Filing

Filing Fees	\$0.00
Convenience Fees	\$4.50
Processing Fees	\$0.00
<b>Total</b>	<b>\$4.50</b>

Payment Account

Tom Cardholder 10/2012

Status	Filing Id	Document Type	Modified	Filing Fee	Additional Fees
 In Progress	ANSWER-20121024-634866908784478420	ANSWER	10/24/2012 3:55:31 PM	\$0.00	\$4.50 <a href="#">Delete</a>

As stated previously, the filing has not been submitted to the court, nor has it been electronically served to the parties. In the “In Progress” status you are free to make additional changes or to cancel the filing altogether. Additionally, you can add more filings using the Create Filing for Case wizard by clicking on the **Add New Filing** link located on the Bundle Detail page. The following shows a bundle with three filings ready to be submitted to the court.

**Information:** ! This bundle has not been submitted to the court yet. Please choose a credit card and click *Submit* to complete the submission process.



**Bundle-20121024-634866908731508992**

**Case Number** 2011-028408-NI

**Case Description** CARSTEN, WILLIAM CHARLES V HENNING, JASON WILLIAM, ET AL

**Court** MI ImageSoft 99th Circuit Court

 Add New Filing

Filing Fees	\$20.00
Convenience Fees	\$13.50
Processing Fees	\$0.60
<b>Total</b>	<b>\$34.10</b>

Payment Account

Tom Cardholder 10/2012

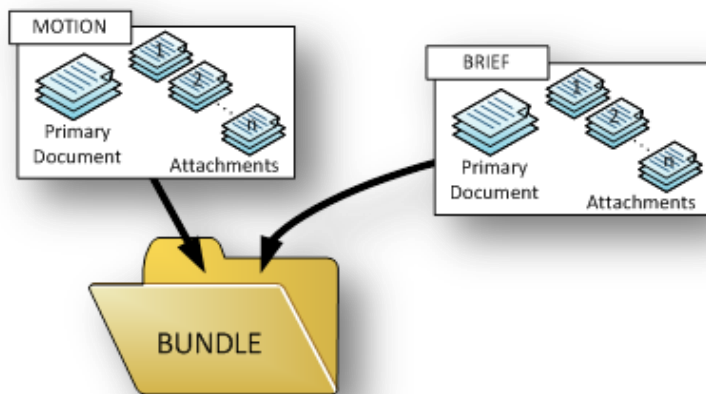
Status	Filing Id	Document Type	Modified	Filing Fee	Additional Fees
 In Progress	ANSWER-20121024-634866908784478420	ANSWER	10/24/2012 3:55:31 PM	\$0.00	\$4.50 <a href="#">Delete</a>
 In Progress	BRIEF-20121024-634866912300304672	BRIEF	10/24/2012 4:00:57 PM	\$0.00	\$4.50 <a href="#">Delete</a>
 In Progress	MOTION-20121024-634866912686090860	MOTION	10/24/2012 4:01:36 PM	\$20.00	\$5.10 <a href="#">Delete</a>

## Preparing a Filing to Open a New Case

Currently, there are no courts supporting case initiation through TrueFiling.

## What Can I File

TrueFiling allows you to file document from your computer. A filing can consist of multiple computer files grouped into a bundle as illustrated below. Each bundle consists of one or more filings, and each filing consists of a Primary File and optional attachments.



A bundle is a TrueFiling concept that allows multiple filings to be grouped together. A bundle can be thought of as an electronic folder. A bundle is required whether you are submitting a single filing or multiple filings. The computer files (primary document or attachments) can be in any of the following formats:

- Microsoft Word (DOC and DOCX)
- Adobe PDF (PDF)
- Plain Text (TXT)
- Scanned Images (TIFF, JPG and PNG)

## Submitting a Bundle and Paying Fees

TrueFiling supports adding additional filings to a bundle using the Create Filing for Case Wizard described earlier. However, the filings in a bundle will remain in an “In Progress” status until the bundle is submitted to the court. The “In Progress” status means that the bundle and associated filings have not

yet been submitted to the court or electronically served to any of the parties.

**Information:** ⚠ This bundle has not been submitted to the court yet. Please choose a credit card and click *Submit* to complete the submission process.



**Bundle-20121024-634866908731508992**  
**Case Number** 2011-028408-NI  
**Case Description** CARSTEN, WILLIAM CHARLES V HENNING,  
JASON WILLIAM, ET AL  
**Court** MI ImageSoft 99th Circuit Court  
 Add New Filing

Filing Fees	\$20.00
Convenience Fees	\$13.50
Processing Fees	\$0.60
<b>Total</b>	<b>\$34.10</b>

Payment Account   
Tom Cardholder 10/2012

Status	Filing Id	Document Type	Modified	Filing Fee	Additional Fees
 In Progress	ANSWER-20121024-634866908784478420	ANSWER	10/24/2012 3:55:31 PM	\$0.00	\$4.50 <a href="#">Delete</a>
 In Progress	BRIEF-20121024-634866912300304672	BRIEF	10/24/2012 4:00:57 PM	\$0.00	\$4.50 <a href="#">Delete</a>
 In Progress	MOTION-20121024-634866912686090860	MOTION	10/24/2012 4:01:36 PM	\$20.00	\$5.10 <a href="#">Delete</a>

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**NOTE:** The yellow information bar on the screenshot above is an example of a warning when the bundle you are looking at still has filings in an “In Progress” status. The filings in an “In Progress” status have not yet been submitted to the court or electronically served to any of the parties.

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To submit the bundle and contained filings to the court:

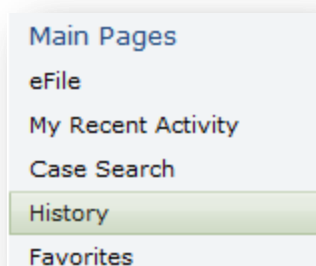
1. Verify the Charges on the Detail Page.
2. Select a credit card as the payment account.
3. Click **Submit**.

The Bundle Detail page will automatically appear after step 5 of the new filing wizard. You can also display the Bundle Detail page by clicking on the bundle name while in the Filing Status page. For more information regarding bundle statuses, see [Checking the Status of a Filing](#).

During submission the filer is required to enter a method of payment. The methods of payment are credit card accounts which are stored in the system for the firm. To add a credit card account to your firm, click the **Accounts** link from the left-side menu.

## Checking the Status of a Filing

The History page provides a list of all the filings that are currently in the system for your firm. This is a great place to get a big picture of everything that has either been filed, or is “In Progress” and waiting to be filed. To open the History page, click the **History** link from the left-side menu.



Filings shown in the History page can be in one of three states:

1. **In Progress** – bundles which have not been submitted to the court. You can make changes to these bundles.
2. **Submitted Filings** – bundles which have been submitted to the court, but which have not received a reply. Filings in this state cannot be changed and additional filings cannot be added to the bundle.
3. **Filed** – filings which have been submitted to the court and have been accepted by the court. Look at the transaction history to see details and the final filed document. Filings in this state cannot be changed and additional filings cannot be added to the bundle.
4. **Rejected Filings** – bundles which have been rejected by the court. Look at the transaction history to see details on why the bundle was rejected. Filings in this state cannot be changed and additional filings cannot be added to the bundle.

Documents that are bundled and filed to the court undergo a conversion to PDF so that they can be accepted by the court. The following important excerpt is taken from the user's agreement which is accepted during the enrollment process. Please read carefully.

IMPORTANT: IN ALL CASES YOUR DOCUMENT IS NOT OFFICIALLY FILED WITH THE RECEIVING ENTITY UNTIL YOU RECEIVE CONFIRMATION ALONG WITH A RETURN COPY OF THE FILED DOCUMENT AND UNTIL ANY RELATED PAYMENTS ARE RECEIVED AND ACCEPTED. BECAUSE THE UPLOADED FILE UNDERWENT A CONVERSION FROM ITS ORIGINAL FORMAT, AND CONVERSIONS ARE NOT GUARANTEED TO BE 100% ACCURATE, IT IS YOUR RESPONSIBILITY TO REVIEW THE RETURNED COPY OF THE FILED DOCUMENT TO ENSURE COMPLETENESS AND ACCURACY. IF THERE IS AN ISSUE WITH THE RETURN COPY, PLEASE CONTACT THE RECEIVING ENTITY IMMEDIATELY TO IDENTIFY THE ISSUE.

To check the transaction history details for a filing, click on the **Filing ID** from the History page. The Filing Detail page will appear.

**ANSWER-20120926-634842597215431986**

**Document Type:** DEFAULT REQUEST, AFFIDAVIT, ENTRY & JUDGMENT (SUM CERTAIN)  
**Case Number:** 2011-002640-CK  
**Case Description:** WESTFIELD INSURANCE COMPANY vs. FARRIS, ANGELA  
**Court:** MI ImageSoft 99th Circuit Court  
**Filing Status:** Filed  
**Filing Fee:** \$0.00

☐ File Only \$2.00   ☒ File & Serve \$4.50   ☐ Serve Only \$2.50

Delete Filing

**Proof of Service**  
9/26/2012 12:45 PM

**Service Recipients**

Address	Served	Viewed
tchaudhuri@imagesoftinc.com	Yes	Yes

Remove Selected Servicing   Re-Send Servicing   Add Service Recipient

**Primary File**

File Name	Size
2011-002640-CK_Answer.tif	670 kb

**Attachments**

File Name	Size
2011-002640-CK_Exhibit1.tif	119 kb

**Transaction History**

Timestamp	Status	Comments	Respond
9/26/2012 12:59:12 PM	Filed	Cindy Smith 9/26/2012 12:59:40 PM : Payment received. Filing officially accepted and filed.	<a href="#">Respond</a>
9/26/2012 12:45:13 PM	Paid	INFO: Payment Accepted. Receipt Number: 951ddffe-cfab-4333-a263-0b6382e68537	
9/26/2012 12:44:06 PM	Accepted	Cindy Smith 9/26/2012 12:44:31 PM : Document conditionally accepted pending payment.	<a href="#">Respond</a>
9/26/2012 12:42:40 PM	In Progress	Received record at 12:43 PM on 9/26/2012.	

The Filing Detail page provides access to the primary document, any attachments, the list of servicing recipients, the automatically generated proof of service (if applicable) and the transaction history.

You can see in the history many things, such as when it was submitted, and when it was accepted. The paperclip icon shown on the left allows the user to download the file-stamped copy of the filing filed by the clerk. This is the official filing, and must be checked carefully after confirmation to ensure accuracy.

**NOTE:** Some courts allow the filer to submit a text response to the court by clicking the **Respond** link (shown above). This link allows for a short text message with optional documents to be submitted to the court.

## Obtaining Additional Information

The best source for answers to questions regarding e-filing with TrueFiling is with the clerk office for the relevant court.

If you already have a Username for the TrueFiling website, login and click the **About** link from the left-side menu. The About page will provide a list of contacts for the courts based on your firm favorites.

If you do not have a Username for TrueFiling, or have forgotten your password then you can find a list of the court contacts by going to the TrueFiling login page ([www.truefiling.com](http://www.truefiling.com)) and click the **New User** link.

You may also e-mail a question to [support@truefiling.com](mailto:support@truefiling.com) .